

SUSTAINABLE MARKETING OF CULTURAL AND HERITAGE TOURISM

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Preface

Heritage tourism has become one of the most popular forms of tourism. Countries across the world have welcomed it as an instrument of economic development and advocacy of local culture and heritage. Heritage scholars often describe heritage as “contemporary use of the past” (Ashworth 2003). This definition encompasses both tangible and intangible elements of the cultural/heritage environment. Heritage tourism, in fact, occupies a forefront position in the global tourism industry because it involves millions of visitors every year who travel to visit a variety of heritage attractions and sites (Timothy and Boyd 2006). Because heritage resources are finite, there has emerged a parallel need to develop strategic marketing plans to ensure cultural and heritage sustainability. This form of sustainability requires “collaboration between tourism and cultural heritage management sectors along with the support for both by the host community as a basis” (du Cros 2009: 94). Contemporary documented literature also points to a growing need for corporate social responsibility which implies an ongoing commitment toward the use of sustainable practices, engagement with local communities, and development of brands which facilitate a dialogue between the organization’s workforce, community, and the local heritage (Parsons and Maclaran 2009). Also, being advocated is a crucial need to plan and develop a sustainable marketing portfolio so that sustainable guidelines are implemented at the grass roots level. Balancing heritage consumption and conservation is not an easy task, not only at the organizational level but also at the individual level.

‘Sustainable marketing’ is a hybrid and paradoxical term. Hence sustainable marketing of heritage tourism is a complex notion as it aims to marry three dynamic disciplines: sustainability, marketing, and heritage. It is also a relatively new phenomenon with a meager body of work to carry the concept forward, conceptually and in application.

Cultural heritage, marketing, and tourism are three broad terms which if blended together in the clay of sustainability can produce a blue print for a strategic plan that is able to offer a breathing space to ongoing cultural discourses across several decades. Literature has often referred to heritage, tourism, and marketing as byproducts of the corporate world, focusing on monetization (permeation of money into the social fabric of the contemporary society). This book indicates that all three can be operated in a responsible and sustainable manner if meshed together with an objective to sustain and preserve cultural heritage in the long run.

The underlying justification for producing this book is the need for the heritage industry to formulate a proactive rather than a reactive consensual plan that can appeal to the suppliers, the regulators, and the consumers of the heritage tourism industry within a sustainability framework. Of the limited body of work that is available on cultural heritage marketing, exploration of a unified and harmonious blend of authenticity, conservation, commodification, civic engagement, and economic viability is remiss. Through the discussion and analysis of existing literature and existing practices in the heritage industry, this book aims to propose a marketing strategy framework grounded in sustainable principles for the cultural/heritage industry. This framework encompasses various components crucial for marketing and strategic planning to succeed in a sustainable manner.

The chapters in this volume suggest that sustainable marketing of heritage tourism and its application, although an arduous task, is not an impossible one. Range of success can be accomplished if knowledge, training, and public sector support in the form of regulations and tax breaks are available. The material presented is not merely an agglomeration of documented secondary research, but the theoretical concepts are grounded in empirical research and interactive discussions with students and the travel and tourism industry. A variety of heritage institutions across the globe are used as starting points to test the applicability of the proposed paradigm. These include museums, historic house museums, heritage hotels/resorts, festivals, and heritage merchandise.

Heritage tourism management needs to adapt to the changing world around it, and as competition grows apace and financial resources become scarce, traditional non-profit heritage institutions are required to perform often polarized tripartite functions of providing entertainment to the mass audience, and promoting civic engagement, and original function as custodians of both tangible and intangible heritage. Overall, the topics are designed to keep both academic and practitioner audience abreast of contemporary trends in sustainable marketing and heritage tourism. Given the orientation of much of this volume, the concluding chapter aims to help contextualize heritage tourism marketing within the broader framework of the non-heritage marketing environment. Important inferences are drawn from general marketing literature.

Structure of the book

This book is divided into two parts. The first part explains the dynamics of heritage tourism, marketing, and sustainability and proposes a strategic praxis drawn from core sustainable principles. Also, the pragmatics of the proposed portfolio is presented from the shaper's (provider's) perspective. The second half of the book is structured around the conceptual model illustrated in Figure 2.1. This is deliberate as the model profiles the author's conceptualization of sustainable marketing of heritage tourism and each chapter in the second half of the book offers an insight into the applicability test of the model.

Chapter 1 develops conceptual material on heritage and heritage tourism based on the documentation of numerous discursive accounts. It also identifies recurrent

themes in marketing and provides a discursive view of the contemporary trends in heritage tourism marketing. Chapter 2 discusses a blueprint for sustainable tourism development. Issues, associated with the sustainable development of heritage tourism, are uncovered. Also, examined are sustainable heritage tourism marketing models from documented literature. Chapter 3 provides an extensive description of various elements that are required to formulate a sustainable heritage tourism marketing model. It begins with the marketing mix and then follows a description of numerous factors that are likely to influence the marketing mix. In closing, the crucial features of sustainability are examined which are later embedded into the proposed strategic sustainable heritage tourism marketing model. Chapter 4 describes the function and issues associated with contemporary museums before turning to examine the degree to which sustainable marketing is pursued by four unique museums. Chapter 5 focuses on historic house museums. It begins first by reviewing the core purpose of various organizations across the world entrusted with the task of promoting the conservation and public use of historic houses. Next, classifications of historic houses are given followed by an examination of multifaceted challenges posing a barrier to the successful and sustainable use of historic museums. The chapter ends with an illustration of the marketing strategies employed by four historic houses situated in four different countries of the world. Chapter 6 offers an interesting insight into the marketing strategies pursued by four unique hotels or resorts situated in different parts of the world and critiques them using the proposed sustainable marketing model. Chapter 7 examines three unique and popular heritage festivals and offers a discourse into the marketing strategies employed by the festival organizers. Chapter 8 begins by nesting heritage buying within the broader context of the tourism shopping phenomena. Next, is provided an overview of research studies on souvenirs and other categories of heritage merchandise. This is followed by an insight into the marketing strategies pursued by suppliers of three unique types of heritage merchandise Kashmiri shawls, Canadian Totems, and Scottish tartans. The concluding Chapter 9 re-examines the marketing strategies pursued by the heritage tourism industry as an aggregate and returns to some of the core themes presented in the first part of the book. Important contemporary sustainable marketing themes from general marketing literature are examined. It asks complex questions regarding feasibility and lessons to learn from a cross-over of marketing practices pursued by the non-tourism industry. The chapter concludes by furthering the proposed strategic sustainable heritage tourism marketing model based on important lessons derived from the illustrated case studies.

Acknowledgments

This book grew out of my years of teaching tourism marketing, where my interest was peaked about whether heritage can be successfully marketed in a sustainable manner. I have been struck by the results from my other body of work which shows stereotype notions of marketing are embraced by heritage institutions. It is considered a stigma by many traditional heritage institutions, which assume that marketing has a pronounced profitability slant. This book is therefore an attempt to highlight the benefits of marketing if planned in a sustainable and responsible manner.

What I initially conceived as being a quick and modest project turned into a lengthy and complex body of research work. I am enormously grateful to the scores of people and heritage institutions who provided assistance and support during the entire process. The bulk of the research and travel expenses were underwritten by awards and college funds. I thank my colleagues at the School of Community Resources and Development, especially Dallen Timothy for his initial encouragement to transform the sustainability discourse into a book. Also, I appreciate the help of Yuta Takeda, an undergraduate student of Arizona State University.

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Finally, I thank my family. This book is dedicated to my father, Dr. G.S. Chhabra and my late mother, Sharanjit Walia, who is no more with me but continues to inspire through the memories I will always have of her.

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1 Marketing of Heritage Tourism

Heritage tourism has grown exponentially over the past several decades. It is a multifaceted term manifested with a wide range of meanings and, therefore, it is not uncommon to find sometimes polarized views of it in published literature. This chapter aims to develop conceptual material on heritage and heritage tourism based on the perusal of numerous discursive accounts. It is also known that marketing of heritage tourism is a complex phenomenon because akin to the heritage debate, a review of marketing literature points to a wide range of discussion on numerous marketing concepts. Marketing as a phenomenon has undergone many changes over the past several decades. The purpose of this chapter is also to identify recurrent themes in the terrain of marketing and conclude with a discussion of contemporary trends in heritage tourism marketing.

Heritage Tourism

Heritage has been a buzzword in tourism since the late nineteenth century. Much scholarly debate with regard to the nature of heritage tourism still persists, suggesting that heritage is an amorphous concept and a complex phenomenon. Myriad viewpoints shape its definition. This can be partially attributed to the positive and negative treatment accorded to heritage. The positive aspect of heritage aims to take care of culture and landscape for long-term use, whereas the negative aspect implies “manipulation and exploitation of the past for commercial ends” (Merriman 1991: 8).

Previous research has broadly classified heritage into two categories: tangible and intangible. Tangible heritage is inclusive of all assets that contain a degree of physical embodiment of cultural values (UNESCO 2000). Examples include cultural objects, movable items, historic towns, archaeological sites, and cultural landscapes. McKercher and du Cros define intangible heritage as “traditional culture, folklore, or popular culture that is performed or practiced with close ties to ‘place’ and with little complex technological accompaniment” (2002: 83). Heritage is also referred to as built heritage which can be classified into three categories (Prentice 1993):

- Historic and artistic: Examples include relics with physical/tangible characteristics.

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- Scientific: This category refers to elements drawn from birds, animals, rocks etc.
- Cultural heritage: Examples include folk, fine arts, traditions, and languages.

In the context of tourism, the word 'heritage' has both cultural and natural connotations (Herbert 1989; Timothy and Boyd 2003; Zeppal and Hall 1992). For instance, Timothy and Boyd create a heritage spectrum that traverses multiple settings ranging from "natural and pristine to the built-urban and artificial" (2003: 9). The authors argue that heritage "represents some sort of inheritance to be passed down to current and future generations, both in terms of cultural traditions and physical artifacts" (2003: 2). Earlier, Richards (1996) defined heritage as a gamut inclusive of ancient monuments, the built urban settings, multiple features of the natural environment, and numerous facets of living culture and the arts. Howard describes heritage as "anything that someone wishes to conserve or collect and pass on to future generations" (2003: 6). Tourism thus stands to benefit from the heritage-tourism link in the range of heritage participation opportunities available across the globe. Convergence of tourism and heritage operations demonstrates the politics of power to control the past and its selected distribution to the tourist (McLean 1995). Heritage is a driving force of complexes which focuses on disseminating cultural capital. Thus, within the tourism context, heritage has become a commodity aimed to fulfill the needs of the contemporary tourist. According to Taylor (2001), heritage tourism is driven by monetary motivations and is being increasingly used today as a distinguishing base to surpass competition. Heritage tourism can exist at different levels: world, national, local, and personal (Graham, Ashworth and Tunbridge 2000).

While the above discussion highlights use of heritage from a tourism perspective, it is also worthy of mention that latent or non-use status of some kinds of heritage also exists. Timothy (2000) identifies several constraints to the latent demand of heritage such as inaccessibility (either physical or market such as work and family obligations and low income levels), lack of educational knowledge, disabilities (creating intrinsic, environmental, and communication barriers), and psychological barriers (such as a popular notion that historic sites are boring, lack of interest or desire). In such cases, deliberate marketing strategies are required to assist in addressing latent demand barriers.

What is heritage tourism? This is probably a simple question but nevertheless a difficult one to answer because so many definitions of heritage tourism adorn the academic radar. Heritage tourism studies have embraced a wide array of themes such as "the analysis of museums, landscapes, artifacts, and activities that concentrate on representing different aspects of the past" (Halewood and Hannam 2001: 566). Nevertheless, a monolithic approach to delineate boundaries is often followed in extant documented literature, thereby neglecting to acknowledge the broader underpinnings of heritage tourism (Apostolakis 2003).

The myriad viewpoints of heritage tourism can also be alluded to by its polarized definitional themes. The first theme is supply-centered and refers to both the tangible and the intangible nature of culture and heritage (Ashworth and Larkham 1994;

Garrod and Fyall 2001; Nuryunti 1996; Yale 1991). Examples include attractions, relics, artifacts, art objects in addition to traditions, languages, and folklore (Apostolakhis 2003: 799). This definitional group also recognizes that a heritage tourism activity comprises of two elements: primary (the main attraction) and secondary (which enhance or support the primary attraction).

The second theme has demand-side connotations and centers on perceptions, motivations, and experiences based on the consumption of heritage resources and, thus, it embodies an interpersonal element (Chhabra, Healy and Sills 2003; Moscardo 2001; Richards 1996; Silberberg 1995). Moscardo (2001) describe heritage tourism as an experience triggered by visitor–source interactions. The entire process is considered interactive. In common with the antecedent viewpoints, Richards (1996) refers to heritage tourism as either a product or a process guided by both demand and supply perspectives. Clearly, this view reinforces the multiple delineations of heritage tourism. The product-based approach refers to the tangible context of sites and museums while the experiential aspect has conceptual underpinnings associated with the motive and meaning attached to a heritage activity.

Poria, Butler and Airey (2001) define heritage tourism as a phenomenon created by visitor perceptions of a heritage site. As is evident, the fundamental tenet here pertains to cognitive perceptions, expectations, and motivations. Motivations for heritage tourism include nostalgia, social distinction, and desire for an ‘authentic’ experience (Poria *et al.* 2001). In fact, of paramount importance are nostalgia and authenticity as motivational factors facilitating demand for heritage tourism. As pointed out by Lowenthal, “if the past is a foreign country, nostalgia has made it the foreign country with the healthiest tourist trade of all” (1985: 4). This means that the past can be transformed into a ‘palatable slice of nostalgia’ in the capitalist economies. Also, popular demand for authenticity has existed since times immemorial and remains strong today (Jones 1993; Grayson and Martinec 2004). However, marketing researchers have only recently begun to take notice of this cult of authenticity.

Spearheading the list of aforesaid motivations across a range of heritage institutions is a pronounced message that “authenticity is a generic and uncontested attribute of any primary heritage manifestation” (Chhabra, Healy *et al.* 2003). Authenticity has played a pivotal role in luring visitors to heritage sites (Chhabra, Healy *et al.* 2003; Halewood and Hannam 2001; Waitt 2000). It is a viable economic resource and can be used to tap and manage current and potential demand. This view resonates with Apostolakhis, who argues that “the concept of authenticity can be managed to generate a procedure through which product characteristics stemming from the supply side of the model can be adjusted accordingly to incorporate the multiplicity of market segments as these are presented through tourists’ motivation patterns” (2003: 699).

Despite the potential significance of authenticity from conservation and consumption perspectives, it remains an elusive concept because of its multiple connotations. Halewood and Hannam (2001) provide an insightful discussion on the ‘authenticity’ perspectives of heritage tourism. The authors highlight three views: heritage is bogus and trash, heritage is staged authenticity, and heritage is

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commodified authenticity. In other words, heritage to them is one of the following (2001: 567):

- Landscapes of nostalgia – it implies that the contemporary growth of heritage tourism is fueled by nostalgia thereby offering a sense of security and stability against the contemporary era of uncertainty.
- Staged authenticity – it refers to contrived settings to satisfy tourists' quests for genuine experiences. This perspective echoes MacCannell's (1992) argument that staging develops a distinct tourism space apart from the real place and this distance ruins all chances of an authentic experience.
- Commodification – this suggests that heritage tourism may lead to the standardization of culture and transform it into a global commodity for consumption. In such cases then, authenticity becomes a marketing tool. Halewood and Hannam (2001) maintain this commoditization as a mixed blessing. It can prove to be lucrative for a host community although its mass consumption can make it inauthentic and disassociated from the original meaning. Bagnall (1996) locates two responses to this problematic term: the emotional realism response and the factual basis response. The first one refers to felt experience, feelings of consuming the past or obtaining a good view of what past life was like, whereas the second response is associated with the desire for experiences that are based on object genuineness and fact. A more detailed discursive view of authenticity is given in Chapter 2.

Regardless of the wide range of views related to heritage tourism, its economic significance helps build a common platform between the supply and demand perspectives. Heritage is of significance in tourism because it provides monetary benefits (Chhabra, Sills and Cabbage 2003; Chhabra, Healy *et al.* 2003; Leones, Colby and Crandall 1998; Davies and Mangan 1992; Garrod and Fyall 2001). It has been posited that the rapid growth of the heritage tourism industry mostly rests on its potential to generate economic benefits (Chhabra, Sills and Rea 2002; Fayissa, Nsiah and Tadasse 2007; Li, Wu and Cai 2008; Simpson 2008). Numerous studies have examined the economic impact of heritage tourism on host communities and its other stakeholders and have reported positive benefits (Chhabra, Healy *et al.* 2003; Crompton, Lee and Shuster 2001; Crompton 2006; Fayissa *et al.* 2007). It has been noted that residents and visitors make monetary contributions to the government in the form of taxes. The government uses some of these funds to subsidize tourism events, promotions, activities, or facilities that lure tourists to spend money within the local community (Crompton 2006). This new money generated by out-of-community visitors generates income and employment for local residents. Thus the host community benefits through the availability of new jobs and increase in household income.

In sum then, the core elements of heritage tourism center on economics, emotions/motivation, inheritance, past, common (shared), authenticity, and participation. Evidently, a precise definition of heritage tourism will be illusionary. But there is little doubt that a number of identifiable characteristics of heritage tourism

exist. Having reviewed multiple themes and definitions of heritage tourism, it is now necessary to consider how concepts can be fused together to coin a holistic and fuller understanding of heritage tourism. To accomplish this task, this book coins a working definition of heritage tourism: a phenomenon that focuses on the management of past, inheritance, and authenticity to enhance participation and satisfy consumer motivations by evoking nostalgic emotions; its underlying purpose is to stimulate monetary benefits for its various constituencies such as the museums, historic houses, festivals, heritage hotels, and other stakeholders. To include a sustainable element to the definition of heritage tourism, one may add to the above while at the same time adhering to specific conservation principles.

Supply and Demand of Heritage Tourism

A fundamental assumption in heritage tourism is that it is an industry, consciously controlled and planned, with the purpose of producing a marketable product. This explains why heritage tourism has both supply and demand connotations. As a useful starting point, this section begins by defining the concepts of supply and demand. As described by Timothy and Boyd (2003: 61), “in traditional economic terms, demand refers to the quantities of products and services that are consumed at various prices.” Supply, on the other hand, is taken to encompass a range of tourism resources and services in a given region. Supply factors often operate as pull factors and their strength helps determine the heritage destination appeal. Timothy and Boyd suggested a broad supply of heritage attractions:

- Museums such as arts, sports, music, industrial science, philatelic, and local history;
- War sites and atrocities such as battlefields, war graves, cemeteries, and memorials;
- Religious sites such as pilgrimages and sacred sites;
- Living culture of distinct groups such as traditions, ways of life, ceremonies, dances, agricultural practices, culinary habits, and arts and crafts;
- Festivals such as those focusing on culture and heritage;
- Industrial places such as mines, quarries, factories, harbors, ports, agricultural relics, railroads and railway museums;
- Literary sites, for example, fictional and real-life places of authors and playwrights. (2003: 59)

Attention in this paragraph shifts to demand. Literature reveals that demand for heritage sites has grown exponentially over the last few decades. This is evident from the increasing popularity of heritage sites in the United States. Within the heritage tourism context, different views of demand exist. For instance, four perspectives of demand are reported by Johnson and Thomas (1995):

1. Current or use demand – refers to the number of tourists to the heritage site.
2. Option demand – refers to the option of a future visit by potential visitors.

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3. Existence demand –refers to the value placed on the heritage site regardless of any current or future use.
4. Bequeath demand – pertains to the desire to promote intergenerational equity; that is, the ability to be able to pass on to the future generations what is acquired from the ancestors.

Demand can also be examined from the source perspective. Significant demand sources include individuals and groups striving to promote heritage attractions, various government agencies, and heritage custodians (Timothy and Boyd 2003). Some authors such as Kerstetter, Confer and Bricker (1998) and Poria *et al.* (2001) relate to demand from the market perspective. Tourists and visitors and their preferences, activities, visitation, and spending potential constitute the market version of demand. Demand also refers to audience-related factors such as group and individual markets, consumer behavior, market segmentation, and target marketing. (Kotler, Bowen and Makens 2006)

Marketing

Attempts to define marketing have engaged the energies of many authors, both academics and those belonging to the managerial field. Given the ordeal of producing a precise and universally accepted definition, Schulz (2001) suggests that this term should cease to be used so that reflections can be geared toward its purpose and significance. In fact, the 2004 definition of marketing by the American Marketing Association was condemned by marketing academicians for its ignorance toward stakeholders, impact on society, and narrow organizational slant (Parsons and Maclaran 2009). Consequently, marketing is being redefined to include the overall society interests. Most recent meaning of marketing in non-tourism literature has thus centered on value co-creation, calling for intensive engagement with the consumers; the emphasis is on “creating systems that result in mutual value although actively supporting rather than directing, consumer creation of value” (Parsons and Maclaran 2009: 7). Arnould and Thompson also support the consumer culture framework and argue that contemporary marketing needs to represent all aspects of consumer phenomena such as “neglected experiential, social, and cultural dimensions of consumption” (2005: 869).

A perusal of marketing definitions in the tourism literature, on the other hand, reveals that tourism is still heavily slanted toward customer needs, satisfaction, and relationship building, although traces of society and stakeholder emphases are beginning to emerge. This book makes an attempt to define marketing as is understood and applied in the contemporary era. Dozens of acceptable definitions of marketing exist. Five well-considered definitions from the tourism terrain and two from the non-tourism field are identified:

- Marketing is a tool to promote your product, a way to improve program attendance, advertising programs to the public, introduce programs to others, and sell what you offer. (Janes 2006: 5)